Request for Information Regarding
Green Line Extension Project

November 3, 2015

Responses due no later than 12:00 p.m. (Eastern) on
November 13, 2015
1. GENERAL INFORMATION

1.1. Background

The Green Line Extension Project (GLX Project) is an initiative of the Massachusetts Department of Transportation (MassDOT) and the Massachusetts Bay Transportation Authority (MBTA) to extend the MBTA Green Line light rail service from a relocated Lechmere Station in East Cambridge to Union Square in Somerville and College Avenue in Medford.

Initially, the GLX Project was divided into phases. The first phase uses a design-bid-build project delivery method. Subsequent phases are included under the umbrella of a Construction Manager/General Contractor (CM/GC) project delivery method. The use of CM/GC on the GLX Project was approved as a pilot program by the legislature and signed into law by the Governor on June 19, 2012. The MBTA Board of Directors approved use of this approach on July 11, 2012. Requisite approval of the CM/GC procurement procedures was issued by the State Inspector General on November 30, 2012.

1.2. Purpose of Request for Information

The MBTA is currently engaged in a review of the GLX Project to address scope and affordability issues related to the GLX Project as well as possible alternatives to the current CM/GC project delivery method, including (A) review of available project delivery options; (B) a look-back analysis of lessons learned; and (C) a cost reduction and value engineering (VE) analysis. A part of the review of available project delivery options includes this Request for Information (RFI) seeking input from the industry regarding future project delivery of the GLX Project.

Further, as a part of the cost reduction and VE analysis, the MBTA is also seeking to reduce the cost of the entire GLX Project and achieve cost certainty, among other goals. In order to determine how to proceed, the MBTA is reviewing all of its options, including ways to optimize scope packages and alternative delivery methods.

As a result, the MBTA is issuing this RFI to receive responses from firms (Respondents) interested in being involved in the delivery of the GLX Project in the event that the MBTA elects to exercise its rights to pursue alternative contracting arrangements as permitted under the MBTA’s contract with the CM/GC.

1.3. Submittal of Responses

Responses shall be submitted in electronic PDF format by email, and any questions related to this RFI shall be sent, to GreenLineRFI@mbta.com.

Each response shall specify the name and contact information for the Respondent’s primary point of contact in the event the MBTA wishes to provide further information to or contact the
Respondent. There is no page limit on the response, but each response should be succinct and a Respondent shall not submit marketing materials and related information intended to establish the Respondent’s overall experience and qualifications. Furthermore, it is not necessary for a Respondent to answer each and every question in Section 3.0. A Respondent is encouraged to only answer those questions where it brings a unique or specific perspective.

Responses are requested by no later than 12:00 p.m. (Eastern) on November 13, 2015, but may still be considered if received after that date. The MBTA may schedule a follow up conference call with a Respondent to discuss its response, with calls anticipated to be during the week of November 16, 2015. The Respondent should indicate in the response whether it is interested in a follow up conference call, and the MBTA may contact Respondents who are capable of leading bidder teams for follow up conference calls.

1.4. Reserved Rights

Issuance of this RFI, and receipt of any response, does not obligate the MBTA to pursue any particular course of action and is without prejudice to any rights and remedies available to the MBTA under applicable law. Further, the MBTA reserves the right to disclose any information furnished by Respondents in response to this RFI, and Respondents acknowledge that such information will not be protected from disclosure under the Massachusetts Public Records Law, Massachusetts General Laws Chapter 66. As such, the Respondent shall not provide any information in response to this RFI that it deems confidential and/or proprietary information.

2. PROJECT DESCRIPTION

2.1. Overview

The GLX Project will extend Green Line light rail service along the following two corridors, the Medford Branch and the Union Square Branch:

- The Medford Branch extends Green Line service 3.8-miles from the current terminus at Lechmere Station in Cambridge to College Avenue in Medford. The improvements are within the existing MBTA New Hampshire Mainline (Lowell Line) commuter rail right-of-way and include a new station at the southern terminus to replace the existing Lechmere Station and five new stations located at Washington Street, Gilman Square, Lowell Street, Ball Square, and College Avenue.

- The Union Square Branch is approximately 0.9 miles long and provides service to Union Square in Somerville. This branch would follow the existing MBTA Fitchburg Mainline commuter rail right-of-way and includes a single new station at Union Square.
Seven new stations have been identified as part of the GLX Project, including the relocated Lechmere Station as well as a vehicle maintenance storage facility (VMSF) to store and service the on-going and future Green Line operations. See Figure 2-1 for a map of the GLX Project.

**Figure 2-1 Project Map**

The GLX Project will be funded through a combination of federal and Commonwealth funds. On January 5, 2015 a Full Funding Grant Agreement (FFGA) between the MBTA and the U.S. Department of Transportation Federal Transit Administration (FTA) was signed that establishes the scope of federal participation in the GLX Project. Under the FFGA, federal dollars will fund approximately one-half of the GLX Project engineering and construction costs and Commonwealth funds from MassDOT will pay for the other half. Based on the then-current project capital costs of $2.3 billion, the federal participation for the GLX Project will be $996,121,000. The Commonwealth will be responsible for the remaining costs of the GLX Project.

State-level environmental review was completed in July 2010, and a Finding of No Significant Impact was issued by FTA on July 9, 2012.
2.2. Project Phases

To provide maximum flexibility and due to uncertainty in funding and schedule limitations, construction of the GLX Project was divided into phases, with a separate procurement for 24 new light rail vehicles (LRV). The phases are described below.

2.2.1. Phase 1

Phase 1 consists of the reconstruction of the Harvard Street Railroad Bridge in Medford and the Medford Street Railroad Bridge in Somerville, as well as the demolition of the MBTA-owned facilities at 21 Water Street in Cambridge. Phase 1 was advanced to utilize funds from the Commonwealth largely outside the FTA “New Starts” program. This work began in 2013 and is substantially complete.

2.2.2. Phase 2/2A

Phase 2/2A extends service from the (new) Lechmere Station to Washington Street and Union Square Stations. The Phase 2 activities include:

- Construction of viaduct and guideway from Land Boulevard to the New Lechmere Station;
- Construction of the New Lechmere Station (including bus station);
- Construction of the Washington Street Station;
- Construction of Green Line viaduct, track and guideway to Washington Street, Union Square and the VMSF site;
- Reconstruction of the Washington Street rail bridge;
- Demolition of existing Lechmere viaduct and station;
- Improvements to area roadway, traffic and pedestrian systems;
- Relocations of utilities;
- Construction of an interim LRV storage yard; and
- Construction of associated signal systems and power and communication systems.

Phase 2A activities include:

- Construction of the Union Square Station;
- Construction of retaining walls along the corridor;
- Relocation of the Fitchburg commuter rail line;
- Construction of bridges/viaducts for the Union Square Branch;
- Construction of new Green Line tracks;
- Construction of traction power (including overhead catenary system and substation); and
- Construction of transit signal and communication systems.
2.2.3. Phase 3

Phase 3 constructs the VMSF. Phase 3 activities include:

- Demolition and site remediation of existing properties;
- Construction of a new maintenance facility and equipment;
- Construction of the storage yard and systems for 76 LRVs; and
- Construction of a new transportation/maintenance of way building (including employee parking at grade and a parking deck over the rail yard).

The full build-out of the VMSF is not needed to support Phase 2/2A passenger service to Washington Street and Union Square Stations.

2.2.4. Phase 4

Phase 4 extends service from Washington Street Station (completed as part of Phase 2) to College Avenue Station. Phase 4 activities include:

- Construction of four new Green Line stations (Gilman Square, Lowell Street, Ball Square and College Avenue);
- Construction of retaining walls along the corridor;
- Reconstruction of four bridges to widen the corridor;
- Relocation of four miles of the dual-track Lowell Commuter Rail Line (including systems);
- Addition of a bridge at College Avenue;
- Relocation of utilities and drainage systems;
- Construction of new Green Line track;
- Construction of traction power (including overhead catenary system and substations at Ball Square and Gilman Square);
- Construction of transit signal and communication systems; and
- Improvements to roadway, traffic and pedestrian systems.

2.3. Project Procurement and Award

The Phase 1 construction package was awarded to Barletta Heavy Division, Inc. on December 13, 2012 through a design-bid-build project delivery method, and construction began in early 2013. Phase 1 of the GLX Project will be funded completely by the Commonwealth.

It was the intent of the MBTA to deliver the remainder the GLX Project using the CM/GC project delivery method. MBTA employed a two-step procurement process for a CM/GC team through issuance of a Request for Qualifications and a Request for Proposals (RFP). On May 21, 2013, MBTA completed the scoring of the responses to the RFP for CM/GC services, and White
Skanska Kiewit JV (WSK) was in turn identified to be the first-ranked team and selected as the CM/GC for the GLX Project.

The MBTA and WSK entered into a preconstruction services contract under which the CM/GC worked with MBTA to provide services in connection with the development of Interim Guaranteed Maximum Prices (IGMP).

The MBTA also entered into a master agreement with WSK setting forth the principal terms and conditions with respect to the construction of the GLX Project. Specifically, the master agreement sets forth the process to negotiate and enter into an IGMP contract for a particular construction package. The master agreement also provides for termination in the event that negotiations on any IGMP are unsuccessful.

2.4. IGMP Construction Packages

During preconstruction services, the following IGMP construction packages were defined:

- IGMP-1: Procurement of long lead items (bridge steel, special track work, signal and electrical equipment) associated with Phase 2/2A and 4. This work began in October 2014 and is expected to be completed by August 2016.

- IGMP-2: Construction of utility relocation work elements that do not require additional FTA approval (Phase 2/2A and Phase 4 utility relocation work). This includes construction of utility bridges at the Broadway, Medford Street and School Street bridges. This work began in October 2014 and is expected to be completed by December 2016.

- IGMP-3: Phase 2/2A work approved by the Letter of No Prejudice (LONP) by FTA on July 9, 2014 for drainage work in the Millers River area and relocation of the Fitchburg Main Line between the Red Bridge area and Union Square. This work began in October 2014 and is expected to be completed by September 2016.

- IGMP-4A: Procurement, fabrication and installation pricing for viaduct steel. This work began in November 2014 and is expected to be completed by March 2017.

- IGMP-4: This work includes the balance of the work for Phase 2/2A. It also includes the Tufts interlocking and retaining walls north of College Avenue, both of which are located in the Phase 4 area.

- IGMP-5: The balance of the work for Phase 4. This work is anticipated to begin in November 2015.

- IGMP-6: Remediation and demolition at the VMSF site (Phase 3). This work is projected to begin in February 2016.
• IGMP-7: Construction of the maintenance facility, transportation building and train yard (Phase 3). This work is projected to begin in July 2016.

2.5. Current Status of IGMP Construction Packages

The MBTA has entered into IGMP contracts with the CM/GC associated with IGMP-1 through 4A construction packages, with a total contract value of $206,512,960. IGMP-5 through 7 construction packages are currently in design.

With respect to the IGMP-4 construction package, the project budget used for the FFGA assumed a cost of approximately $487 million. However, the IGMP for the IGMP-4 construction package submitted by the CM/GC was approximately $889 million.

As contemplated by the current CM/GC process, if the MBTA and CM/GC are unable to reach agreement on an IGMP contract, then the MBTA may re-procure the work related to the unsuccessful IGMP by any other lawful procurement method. The MBTA may also terminate the entire CM/GC process and procure the remaining elements of the GLX Project by any other lawful procurement method.

2.6. Eligibility of Contractors and Consultants

Determinations on the eligibility of individual contractors and consultants in any future re-procurement related to the GLX Project will be made in accordance with the MBTA’s CM/GC Procurement Manual and other policies, applicable Massachusetts law, and the FTA’s organizational conflict of interest rules and regulations.

2.7. Project Redefinition

The MBTA is currently exploring ways to redefine the GLX Project in order to reduce costs. The results of this process will be incorporated in any subsequent procurement.

2.8. Additional Information

For additional information about the GLX Project, see www.mbta.com/business_center/bidding_solicitations/current_solicitations and http://greenlineextension.eot.state.ma.us/.

3. QUESTIONS AND INFORMATION SOUGHT

Please provide responses to the following questions:

3.1. Describe your firm and the role your firm may play in the delivery of the remainder of the GLX Project.
3.2. What are the optimized scope packages for the remainder of the GLX Project (including smaller packages than the current IGMPs, bigger packages than the current IGMPs or a combination thereof), with a focus on lowering costs, optimizing competition, achieving efficiencies, reducing risks and achieving cost certainty? To what extent would your firm be interested in participating?

3.3. What are the optimized project delivery methods for the remainder of the GLX Project (including design-bid-build, design-build and a combination of methods) corresponding to the scope packages, with a focus on lowering costs, optimizing competition, achieving efficiencies, reducing risks and achieving cost certainty? To what extent would your firm be interested in participating?

3.4. What measures can be taken to address interface and coordination issues among separate contractors in the event that the remaining portions of the GLX Project are constructed by different contractors?

3.5. Discuss the advantages and disadvantages of procuring a single design-build contract for the remainder of the GLX Project. To what extent would your firm be interested in participating?

3.6. What else can be done to reduce project costs for the remainder of the GLX Project?

3.7. What else can be done to better achieve cost certainty?

3.8. What are the most critical risk items associated with the delivery of the GLX Project? How could these risks best be addressed through project delivery choice, packaging of the work, and contract commercial terms and conditions?

3.9. What other innovations or alternatives for the delivery of the GLX Project should be considered?